ORIGINAL SCIENIFIC PAPER

PRIVATE SECURITY BUSINESS: STATE AND TRENDS IN SERBIA

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ABSTRACT

Private security is a relatively new branch of economic activity. Some studies conducted in some countries have shown that the private security sector is constantly expanding. In this paper, the authors investigate the state and trends in private security in Serbia. Taking into account that private security is a social phenomenon, the phenomenon of private security in Serbia was studied by applying the methods of social and humanistic sciences. Based on data from the Ministry of Interior and the Serbian Business Register Agency, the authors come to the conclusion that private security in Serbia is also expanding. Although the authors started from the hypothesis that the growth of private security could also affect the growth of the economy, this hypothesis was not confirmed in this research. The positive state and trends of private security in Serbia represent an additional support for investments in Serbia.

Keywords*: private security, state, trends, license, economic impact*

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INTRODUCTION

The traces and roots of private security can be found in ancient civilizations. Thus, in ancient Egypt there was a pharaoh's guard, and in the Babylonian Empire bodyguard and the states of ancient Greece, for the first time, the familiar term bodyguard. Alexander the Great had an honorary bodyguard, while in Rome there was the famous Praetorian Guard [1]. Author [2] wrote that the forerunners of private security were civil guards in big cities for night security, which took place on a rotating basis.

Scholars who explored medieval Serbia and its legal system mostly rely on Dušan's code. Local self-governments at the time had to organize guards who were obliged to protect cities and villages from crime. In addition, the guards guarded the roads and every type of crime had to be reduced to a minimum. Although it can be considered that these are the beginnings of police and state organizations for the maintenance of order, in historical sources authors find that in medieval Serbia an escort of the money and valuables of the time was organized [3][4]. In the later years of his reign, the Tsar organized a heavily armed unit of selected warriors from Serbia [5].

Based on historical sources, authors can claim that private security has a long tradition in Serbia, where the first companies for the security of persons, property and business were founded between the two world wars. After World War II, private security was nationalized into state property and expressed through the operation of security services within publicly owned companies. After the great turbulence in the world at the end of the 20th century, a wave of changes reached our area, which also affected the field of private security and security at all. The biggest problem for the work of companies providing private security services was the lack of legal regulation in this area. After two decades, in 2013, the umbrella regulations in the field of private security were adopted (the Private Security Law – hereinafter: PSL and the Private Detectives Activities Law), and later by-laws were adopted for their implementation. Most of the solutions were adopted in accordance with the good practice and legislation of the EU countries and in accordance with our legal tradition, which is also visible through some concrete solutions [6]. Looking at the legal framework of the EU, it is concluded that there is no special regulation regulating private security services at the strategic level. At the level of the EU member states, we see different systems, where individual states regulate the issue of private security with general legal regulations (Germany) or others that have a special law regulating the area of private security.[7]

Specifically, the PSL regulates mandatory licensing of business entities and security officers, general and special conditions for licensing, types of licensees, way of performing certain tasks, powers of private security officers, mandatory possession of identification, record keeping, supervision and misdemeanors [7]. Private security entities provide additional security services aimed at protecting the personal and property security of citizens, securing public gatherings, securing the transport of money and other valuables or finding persons and objects, as well as services in the field of detective work that are an integral part of private security. Private security companies in Serbia are recording a trend of increasing profits. However, in 2021 private security as a service earned almost 5 million € less than in 2020, which is a drop of about 13% [8].

Private security forms an integral part of overall security and the aim of this paper is to study the state and trends of private security after the enactment of the PSL in Serbia. The basic hypothesis from which the authors start is that the enactment of the PSL led to the introduction of all segments of private security in Serbia into legal channels and that this had a significant impact on the economy as well. The authors will try to provide answers to questions about the size of private security in Serbia, the number of entities participating in it and other parameters that are important for researching the state and trends in this area. The primary goal of this paper is an overview of the state and trends in the field of private security, an assessment of its size in relation to public security – the police, and possible economic impact in Serbia.

METHODOLOGY

Authors carry out the analysis of relevant domestic and foreign literature dealing with private security research. From the Ministry of Interior (hereinafter: MoI), the authors requested official data related to issued and revoked licenses for business entities and persons. The data obtained in this way were checked through the database of the MoI ‘PTS – Records of licenses and IDs’ so that the data from the database were taken as relevant. Data from the Ministry of Interior’s Information Booklet [9] for the period 2017-2022 were used and data of Statistical Office of the Republic of Serbia [10].

Looking at the reform of private security in Serbia is impossible without analyzing the legal norms governing the area because the reform is a legal phenomenon. Therefore, an analysis of the legal norms regulating this area was first performed using normative, historical-legal and comparative methods. Taking into account the subject of the research, it was necessary to apply the methods of social sciences and humanities because reform is also a social phenomenon [11]. The authors use methods of analysis, synthesis and statistical methods in the paper. The collected data were first processed and then displayed with graphic models in the paper. The authors also conducted a field study through questionnaires and interviews in order to test the implementation of the law. The sample consists of 27 companies that responded to the questionnaire.

BRIEF LITERATURE REVIEW

In scientific theory and expert circles, there is no unified position on whether special legislation is necessary for the field of private security or whether all its specificities can be incorporated into the general legal regime that applies to all other specific activities [12]. According to the opinion of the United Nations, regarding the legal regulation of private security, states can be divided into three categories: 1) those without state regulations, 2) those with inadequate state regulations and 3) those with effective regulations. Most countries fall into the first two categories[13].

Comparatively, most EU member states have special legislation related to the private security sector, except for Austria, the Czech Republic and Germany [14][15][16][17]. In Europe, there is a long tradition of regulating private security. Laws were passed in Italy in 1940, in France in 1942 and in Switzerland in 1943. Button, Stiernstedt wrote that when legally regulating the area of private security, EU countries must take special care of the fulfilment of three main conditions, suggested by the European Court of Human Rights, namely the freedom of movement of people, services and capital, freedom to establish a company and freedom to provide services [18].

The legal system in the Republic of Serbia, in recent history, is characterized by 'greyness’ or 'shadowiness’. In some beginnings in the field of private security, general regulations applied as for all other business entities. This framework did not take into account the specifics of private security. Although the PSL was passed in 2013, its full implementation began only six years later when the secondary legislation were passed [19].

What is characteristic of the Serbian legislator is the fact that it left a longer period of time for business entities to harmonize their operations with the norms of the PSL. Business entities that perform private security services have been given a deadline of July 5th, 2015 to harmonize their work, and companies that own weapons other than those issued, that is, escort money and valuables, and have a deadline of even December 5th, 2016. However, the *vacatio legis* continues as amendments to the PSL from 2015 enable private security companies to bring their work into line with the PSL by January 1st, 2017, with the exception of money and valuables transport companies that have already set deadlines remain in effect. At the beginning of the implementation of the PSL from 2013, licenses for legal entities and persons are introduced, conditions for obtaining them, mandatory training, etc. are issued [20].

In 2018, the legislator decided to amend the PSL. All in all, and with all the delays in implementation, the law will finally see its full implementation only at the end of November 2019. Although the full implementation of the law and by-laws was long awaited, probably the most important feature of the legislative arrangement in the field of private security is the prevention of ‘illegal labour’ [21].

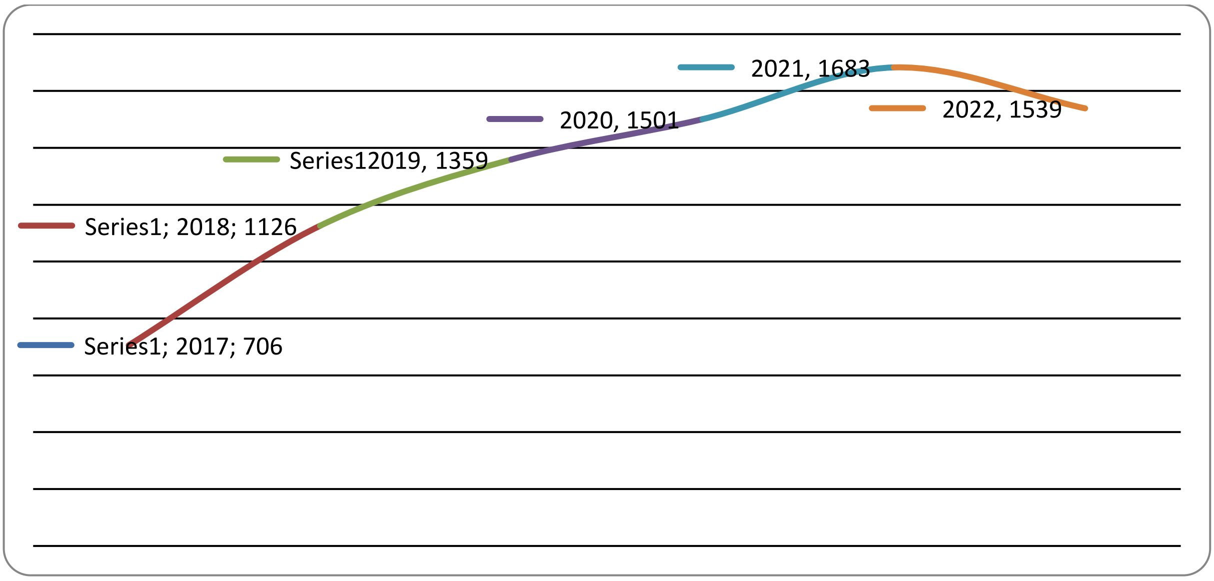
A survey that was conducted before the start of the PSL showed that by 2015 there were 600 registered companies, but realistic assessments suggest 300 viable companies in Serbia, almost half of that number were based in Belgrade. It was estimated that there were 40 to 50 thousand employees and around 140 million € annually value of private security market. [22] However, the data of Confederation of European Security Services (CoESS) indicates that in Serbia by 2015 there were 291 private security companies employing approximately 26,000 private security officers [23].

Private security surveys in Sweden [24], Netherlands [25], Denmark [26], Poland [27], Bulgaria [28] and Slovenia [29] show an increase in the number of subjects participating in the private security market.

RESULTS AND DISCUSSION

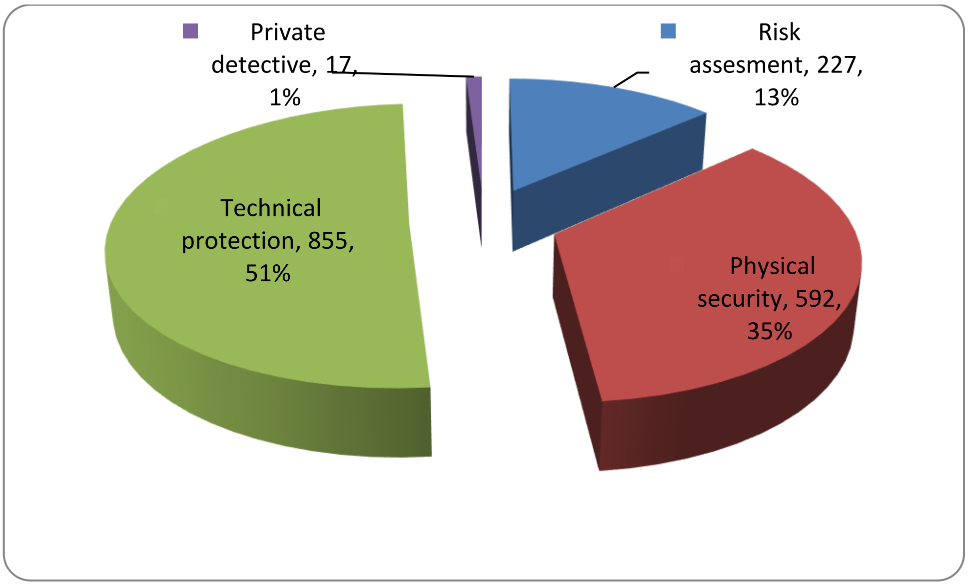
The development of the private security in Serbia was explored in the temporally period from 2017 to 2022 in Serbia through the following parameters: 1) Total number of issued and revoked licenses for business entities; 2) Licenses issued to business entities by type; 3) Licenses issued to business entities according to the legal types; 4) Spatial distribution of issuing licenses to business entities; 5) Total number of licenses issued and revoked to persons; 6) Number of private security officers and police officers per 100,000 inhabitants; 7) Licenses issued to persons by type; 8) Licenses issued to persons according to the legal types; 9) Spatial distribution of issuing licenses to persons; 10) Field study of private security in one Serbian city.

As can be seen from graph 1, in the observed period, there is an increasing trend in issuing licenses to business entities. However, in 2022 we see a slight decline because a certain number of business entities did not renew their license, which indicates a loss of interest in private security business. We can also hypothesize that a certain number of business entities have moved into the ‘shadow’ zone. The majority of business entities (70%) provide security services for profit while the rest do it for their own needs (in-house) and almost all are in private ownership. If we analyze the origin of capital, we see that foreign capital participates in only 2% of the total number of business entities registered in the field of private security in Serbia. Therefore, there is room for improvement here [29]. However, these 2% earn more than the others who are domestically owned [8]. If we look back at Sweden substantial growth of the private security sector in this EU state is also visible through the increasing number of registered security companies. In the early 1980s, there were approximately 100 security companies in Sweden. By 1993, the number of companies was 362, and in 2016, 900 companies dealt with investigation and security services, and employed just over 24,000 people. [24] The same trends can be observed in Netherlands and worldwide. [25] In Denmark, the number of companies in the field of private security is decreasing in the period 2010-2020, so that in 2020 there were 286 companies compared to 2010, when 302 were registered, which is 5% less. [26]



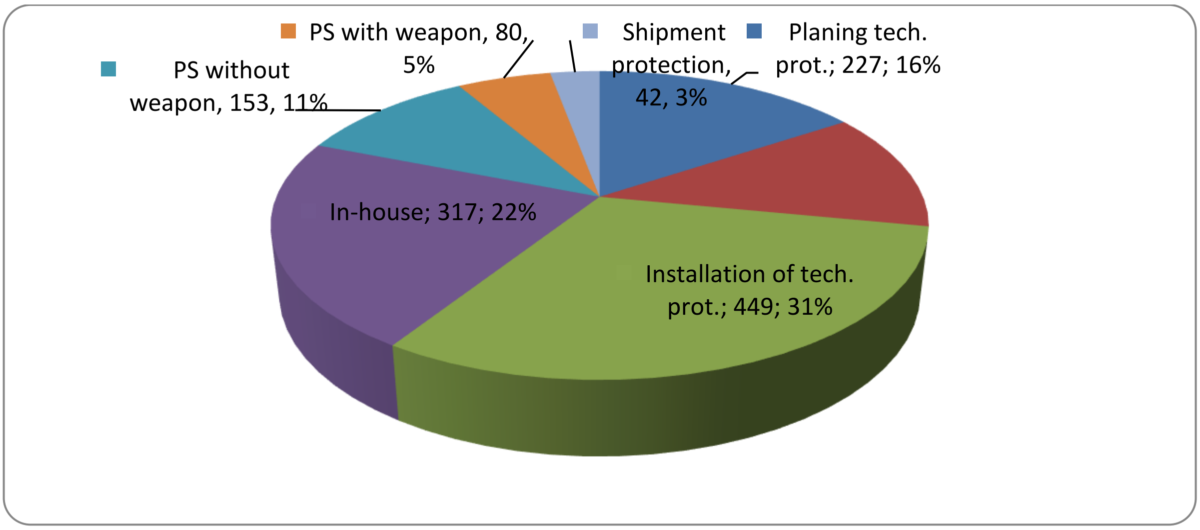
Graph 1: Total number of issued and revoked licenses for business entities

Business entities in Serbia in most cases decide to carry out technical protection, followed immediately by physical security and risk assessment. The number of business entities of detectives is negligible and it can be considered that this activity is insufficiently developed in Serbia (Graph 2). If we look at the size of business entities, we see that most are in the status of micro enterprises, while there are around 20% in the status of small and medium enterprises, and there are only 2% of large enterprises. If analyze data of total number of business entities in Serbia in 2020, which is 90,111, it was observed that it is only slightly more than 1% in private security. The private security industry in Serbia serves precisely to be an auxiliary service to other branches of the economy and to provide them with business security so that they can produce additional value [8]. According to the research of the Chamber of Commerce and Industry of Serbia in the third quarter of 2023, 51.9% of the respondents believe that the turnover is unchanged compared to the second quarter of 2023, and 32.5% of the respondents believe that the level of turnover has increased. [31]



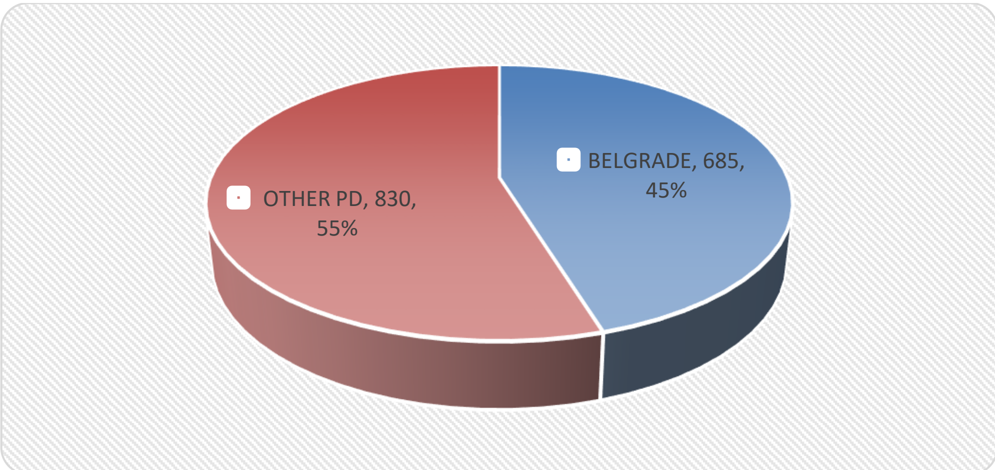
Graph 2: Licenses issued to business entities by type

As can be seen from graph 3, the largest number of business entities in Serbia decided to be licensed for technical protection and in-house security. They are followed by other types of licenses. This trend is expected, on the one hand, taking into account technical development and the use of new technologies in the field of security. Citizens and the economy have access to a huge selection of technical achievements that are significantly cheaper than hiring physical security. When it comes to in-house security, it must be noted that in Serbia it is an inherited situation from the time of socialism that every business entity has its own internal physical security. Also, this type of internal security service organization is significantly cheaper. One study showes that in Poland about 5200 security companies employ 114,000 qualified security personnel and 18,000 qualified technical security personnel. Of this number, 1084 specialised protection formations, of which 265 are internal security services (in-house), and 819 are contractors who have obtained the bearer's license for firearms. [27] In Bulgaria one research have shown that there were 2,603 firms with active licences but onlu about 300 are active firms that have sustainable private security business. The rest have a licence, but have developed their activities in another domain or are inactive. [28] In Slovenia since 1998, there has been no further increase in the number of private security companies, but rather a decrease in their number and an increase in mergers of existing companies. By January 2023 there are currently 158 private security companies in Slovenia. [29] As of 2024 in German Private Security there are 5.597 business entities, which is an increase of 3.5% from 2023 and have grown 3.5% per year on average over the five years between 2019 and 2024. In France there are 5,337 business entities by same period of time, which is decline of -1.3% from 2023 but have remained steady over the five years between 2019 and 2024. In Belgium there are only 306 businesses entities as of 2024, which is a decline of -4.9% from 2023. [33]



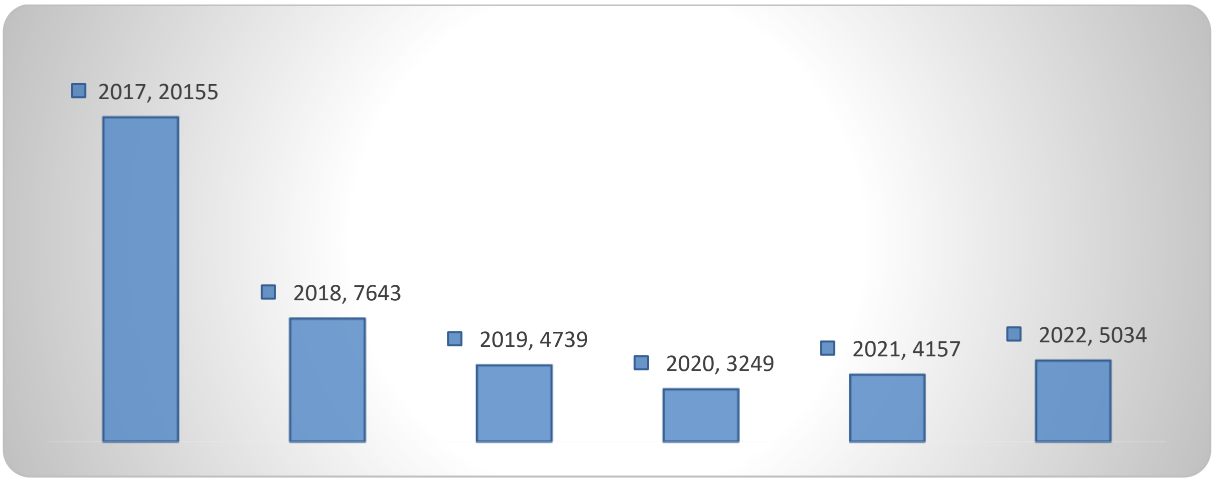
Graph 3: Licenses issued to business entities according to the legal types

The spatial distribution of licenses shows us that the most licenses were issued in Belgrade, while in the rest of Serbia that number is around half (Graph 4). Among the police departments in the interior of Serbia Novi Sad, Niš, Kragujevac, Čačak and Šabac are distinguish, while other police administrations have less than 3%. This territorial distribution absolutely corresponds to the population and economic redistribution. Belgrade is the capital and administrative centre of Serbia, while other cities are local leaders in Serbian regions. However, these results are unfavorable from the point of view of regional development. The excessive concentration of business entities in Belgrade attracts smaller investments in regions that are less developed. In the future, these trends would have to be changed and the state should stimulate the start-up of private security businesses in the interior of the state and in less developed areas. Comparatively observing we can notice same trend in London (UK) because the London's financial power, high crime rate and premium events make it a focal point for security providers, propelled by increased public safety funding post-terrorist attacks. [32]



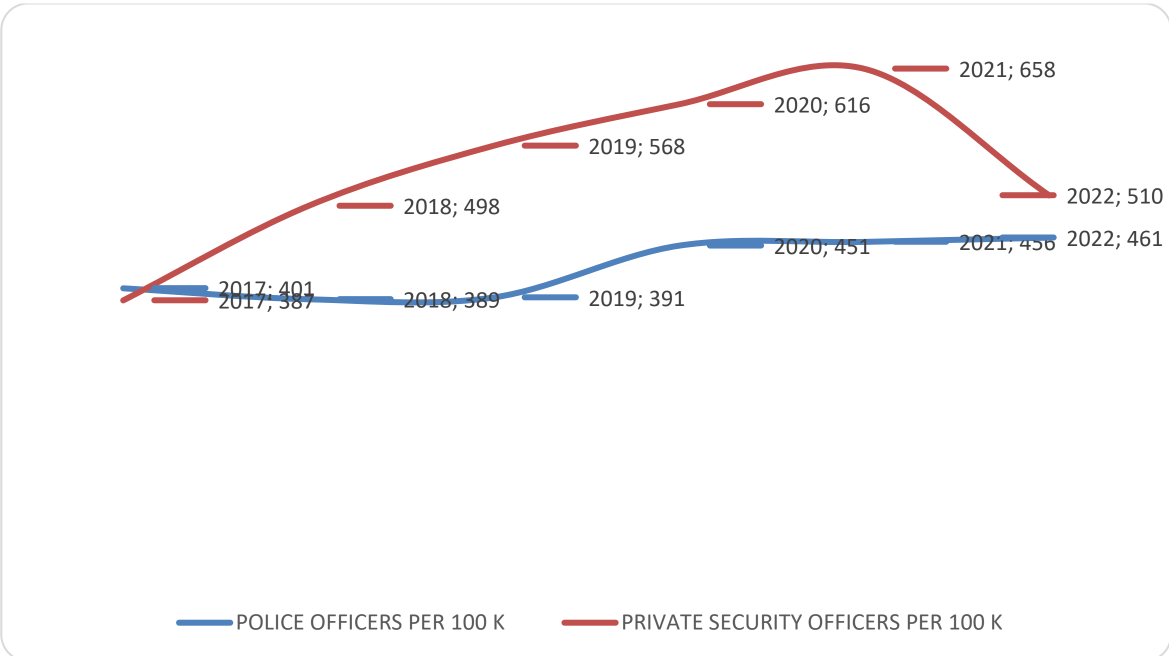
Graph 4: Spatial distribution of issuing licenses to business entities

As can be seen from graph 5 the key year for issuing license for persons was 2017 when the PSL started to be implemented. In other years, the number of licenses is significantly lower. There is also a slight increase in 2021 and 2022, which is the result of the reissuance of licenses that have expired, i.e. those that were issued in 2016 and 2017 (the validity period of the license is five years). Likewise, if we compare the number of employees in Serbia in 2020, which is 1,248,987, we see that the private security industry only accounts for almost 3% of the total number of employees [8]. However, according to research by the Chamber of Commerce and Industry of Serbia, the total number of employees in private security and other service activities, in the second quarter of 2023 was 540,094, which is 2.3% more than in the same quarter of 2022, where private security participates with only 1.6% in total employment. [31]



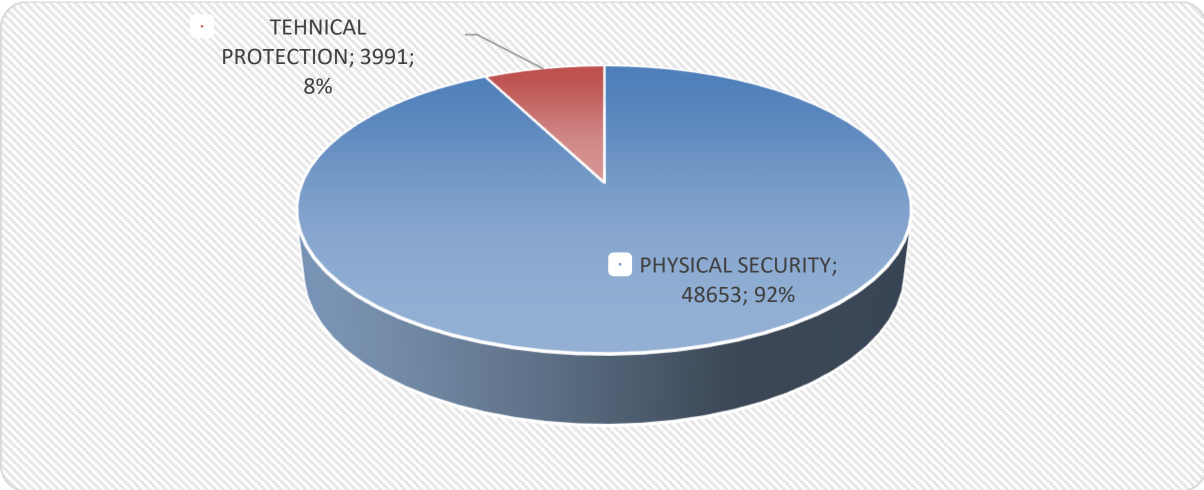
Graph 5: Total number of issued and revoked licenses to persons

In order to examine trends in the field of private security, the authors linked the number of private security officers and police officers in relation to the number of inhabitants (Graph 6). In the observed period, the number of police officers per 100,000 inhabitants was relatively the same without large fluctuations. On the other hand, the number of private security officers grew until 2021, but in 2022 a decline was recorded. If we relate this data to the data on business entities (Graph 1), we see that interest in this area of business is falling. In the early years, the rate of private security officers was about the same as the rate of police officers, but it has increased over the years. However, we see rates moving closer to each other again in 2022. As of January 2023 there were no less than 303,336 licensed door supervisors in the United Kingdom, making it by some distance the largest subsector of the licensed UK private security industry, the total population of which stood at 456,727 officers [33]. By comparison, until 2013, the industry had an estimated employed 364,753 private security officers – more than twice the number of police officers, which stood at 162,324. [34] For several years, the number of private security guards outnumbered the police in Sweden. Recently, this has started to change. In 2020, the total number of people working as security guards was 18,908, while the number of police officers totalled 20,942. [24] In Denmark, the number of private security officers increased by as much as 31% in a ten-year period, and in 2020 there were 3,634 private security officers. [26] Private Security industry as of 2024 in Germany employed 261,050, in France 150,565 and in Belgium only 18,410 people. [32] If we look back in the past, identical trends can be observed for example in the Netherlands. [25]



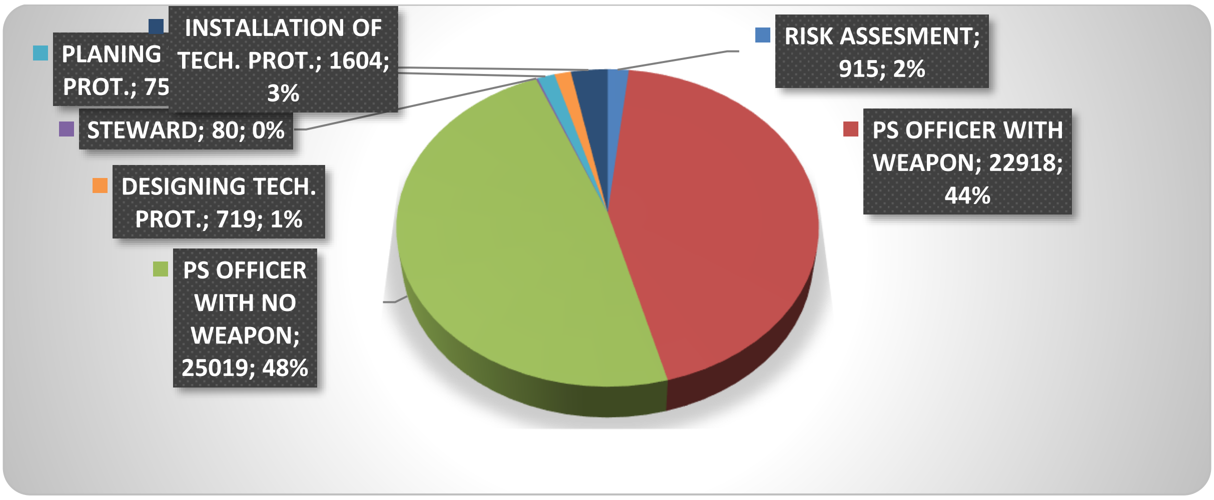
Graph 6: Number of private security officers and police officers per 100,000 inhabitants

Looking at the basic types, we see that the majority (92%) of the licenses issued to persons are actually for physical security, while only 8% are for technical protection (Graph 7). This fact is contrary to the fact that business entities are more interested in technical protection licenses. A larger number of physical security officers are expected, bearing in mind that the legal requirement for obtaining a license for a business entity is a minimum of ten employees who are licensed physical security officers. Such results may indicate a kind of discrimination to the detriment of business entities in the field of physical security. According to the research of the Chamber of Commerce and Industry of Serbia, about 57.1% of companies from the private security industry did not change the level of employment in the third quarter of 2023, and this is the unique position of this branch of industry in this matter and in terms of expectations in the fourth quarter of 2023 (80.5%). [31]



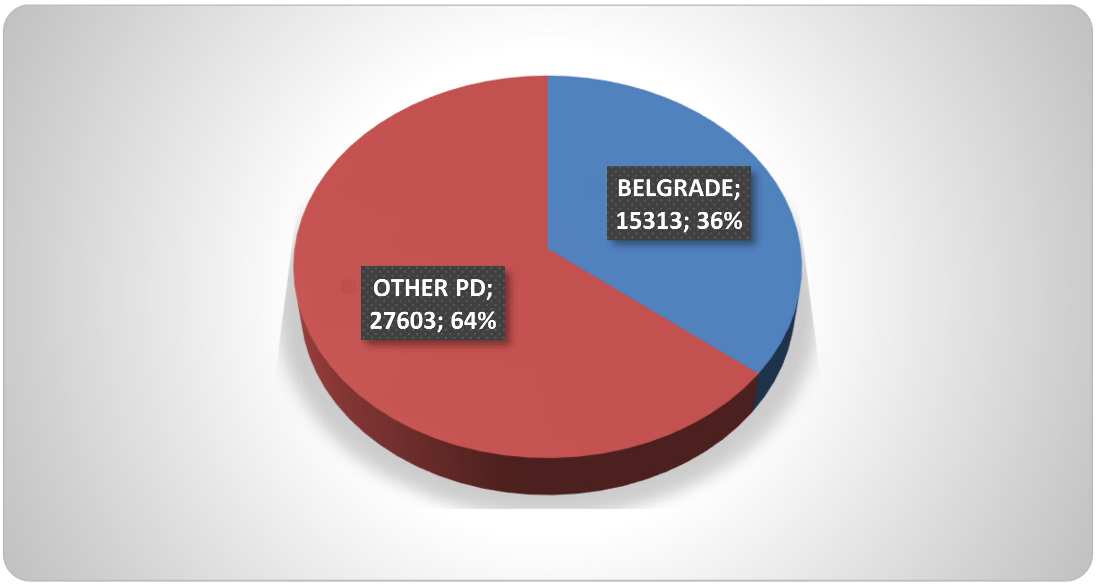
Graph 7: Licenses by type issued to persons

Graph 8 shows the numbers of licensing of persons in Serbia according to the types of licenses issued by PSL. The largest number are physical security officers (with or without weapons), while the number of technical security officers is significantly smaller. These data correspond to the previously presented data (Graph 7), but if we compare with business entities (Graph 3), we see that the trends are not the same. In order for a company to obtain a license to carry out private security work, for example working with weapons, it must employ at least ten private security officers with a license to carry out private security work with weapons. That is why such a trend was to be expected.



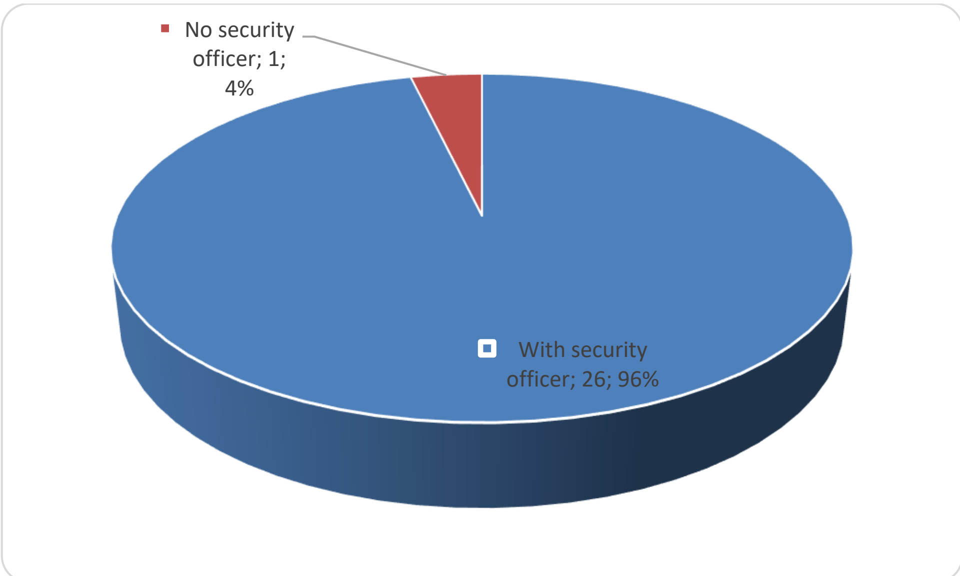
Graph 8: Licenses issued to persons according to the legal types

The spatial distribution of licensing of persons shows us that the majority of private security officers are in the rest of Serbia (mostly Novi Sad, Niš, Pančevo and Kragujevac), but considered individually, Belgrade, in relation to other police departments, is significantly ahead. When compared with business entities, we see that the share is significantly smaller, which tells us that the headquarters of economic entities are in Belgrade, but that they carry out work all over Serbia, where they employ private security officers.



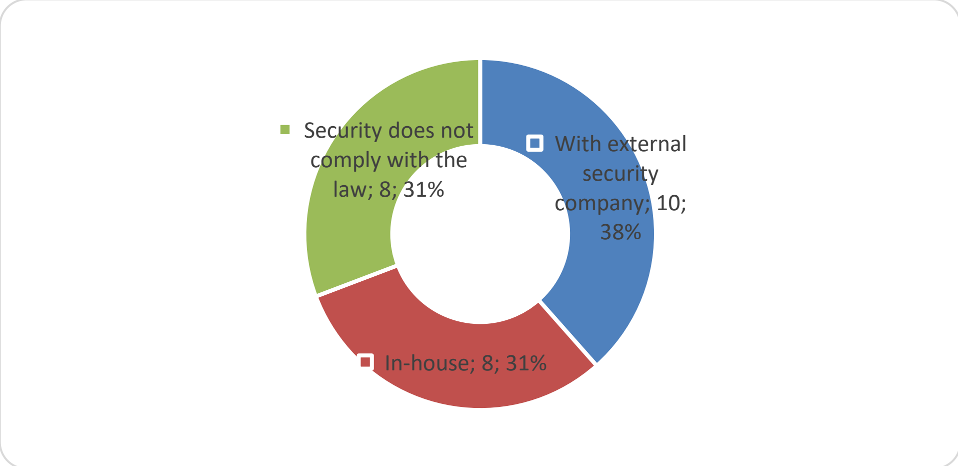
Graph 9: Spatial distribution of issuing licenses to persons

The authors conducted a field study of private security through a survey and observation with direct participation where they chose the territory of a city in Serbia of 1,530 square meters and a population density of about 40 inhabitants per square kilometre. The authors tried to examine more business entities, but only 27 agreed to do so. The first question in the survey was whether they have security officers where the majority (96%) answered that they do (graph 10). For example the German private security in is valued at 9.2 bilion € and is ranked 1st in Europe in 2024 (of 24 total EU countries) and it has remained the same since 2019. The private security market size, measured by revenue, is 11.9 bilion € in 2024 and has grown 3.0% per year on average between 2019 and 2024. Second in range is French private security which is valued at 7.6 bilion € since 2019. The French private security market size, measured by revenue, has declined 0.6% per year on average between 2019 and 2024. On the other hand the Belgian private security in is valued at 1.4 bilion € and is ranked 8th in Europe since 2019. The Belgium private security market size has declined 1.6% per year on average between 2019 and 2024. The private security in UK market size, measured by revenue, was 8.7 bilion £ in 2023 and has grown 2.8% per year on average between 2018 and 2023 (increased faster than the economy overall). The primary negative factors affecting this industry are high competition and low barriers to entry. Business entities in private security in UK have benefitted from public sector organizations outsourcing more security functions to private sector contractors because of low police officer numbers. [32]



Graph 10: Field study of private security – business entities with and without physical security

The next question that the authors wanted to examine in the field study is whether the security is engaged in accordance with the PSL or not and what type of engagement they belong to? From graph 11, we see that the majority have physical security in accordance with the PSL, but that a third of business entities do not comply with the law. We also note that the majority decided to hire an external licensed business entity rather than in-house security. This difference is minimal, but we must state that this data does not agree with the data for the whole of Serbia shown in graph 3.



Graph 11: Field study of private security – types of physical security

CONCLUSIONS

After the passing of the Private Security Law, private security in Serbia recorded a significant growth in all the parameters monitored in this research. In the observed period, the number of companies that have a license increased threefold, but in 2023 a slight decline is observed, which does not affect the state of private security too much. If we look at the trends in some other countries, we can see differences, because in some countries there is growth, while in others there is a decline in the number of companies and market size. Security companies in Serbia choose to be in the field of technical protection rather than in the field of physical security. A significant number of companies that are not in the field of private security have chosen to implement security measures themselves and to be licensed for these jobs. Such trends are also observed in the region.

Private security jobs are concentrated in the economic centers of Serbia, which was to be expected as in some other states. The largest concentration is in Belgrade, followed by other economic centers of Serbia. When the Private Security Law began to be implemented, it became a real ‘boom’ and there was the issuance of licenses to private security officers according to the procedure prescribed by law. In the years that followed, significantly fewer licenses were issued, but a slight increase can be observed in the last three years of the observed period. The number of private security officers in relation to the number of public police officers is higher, which represents a significant ‘force’ in the hands of private companies. In developed countries, such trends are common so that the overall state of security increasingly depends on private security. The Private Security Law also established a kind of discrimination to the detriment of physical security. Companies must meet the requirement of a minimum number of licensed private security officers, which is why the number of this type of officer is significantly higher than that of technical protection officers. Just as companies are concentrated in economic centers, the workforce and employment are also concentrated in the larger economic centers of Serbia.

Most companies are aware of their security needs, i.e. the need to protect their business from harmful events. A little more than a third of the companies hire a professional and licensed company, while a third protect themselves from their own resources. However, a third of the companies have security officers who are not compliant with the law, which tells us that the state must work much harder to promote the law. From the economic aspect, private security does not have a large share in the overall economy of Serbia. However, when investors make a decision on investing money, they also assess the state of security of the location where they should invest. The trends of private security in Serbia are positive and this should be an additional support for investments in Serbia.

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